Inception Report

**Upgrading of the Job Management & Tracking System (JMTS)**

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Prepared by

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1. **Executive summary**

This report documents the scope of work and outlines a work plan as it relates to the Job Management & Tracking System (JMTS) software update and upgrade. The main activities undertaken in the effort to produce this report include the liaising with personnel of the Bureau of Standards Jamaica (BSJ), the National Compliance Regulatory Authority (NCRA) and the National Certification Body of Jamaica (NCBJ). Standard Operating Procedures (SOPs) and audited reports were also reviewed over the past month and a half.

1. **Needs Assessment**

A needs assessment was first conducted by meeting with representatives from the follow organizational entities;

* Engineering Division, Science and Technology Division, Finance Division, Marketing and Customer Services Department, Standards Division and the Industrial Training Unit (ITU), Legal Department and Corporate Office of the BSJ.
* Personnel of the NCBJ.
* Compliance and Construction, Foods Inspectorate and Legal Metrology departments of the NCRA.

The needs were analyzed and the scope of work and work plan were determined as provided in the following sections.

1. **Scope of Work**

Following the analysis of the needs of the various organizational entities, it was determined that a number of JMTS issues needed to be addressed and some features needed to be modified or new ones implemented. The software modules, described in the table below, will be added to the JMTS or modified in order to meet the needs of the organizational entities previously mentioned:

Table: JMTS Modules

| Module | Description/Comment |
| --- | --- |
| Job Management | This is the core module of the JMTS that will be updated and upgraded to meet the needs of the organizational entities. |
| Standards Compliance | This existing module will be revamped to further support the Compliance and Construction department of the NCRA. |
| Certification | This new module will support the activities of the NCBJ and the Certification department of the BSJ. |
| Foods Inspectorate | This existing module will be revamped to support the food factory registration activities of the NCRA. |
| Legal Metrology | This is an existing module that will be reactivated to support legal metrology activities pertaining to petrol stations and weighing instruments. |
| Task Management | This is a new module that will allow the assignment and management of tasks assigned to a department or individuals. |
| Legal Office | This is new module that will be an implementation of the existing Legal Department Portal web application that is currently used by the Legal department of the BSJ. The Legal Department Portal web application will be retired when this module is completed. |
| Service Request | This web service module will be implemented to offer support to external clients as it relates to service requests and job status updates. |
| Standards & Certification | This module will facilitate the management of the standard development and certification activities of the BSJ. |
| Client Management | This module will provide basic Customer Relationship Management and other features for use by the ITU and Marketing departments of the BSJ. |
| Financial Administration & Management | This existing module will be enhanced to allow personnel within the Finance division to configure and manage the financial aspects of the JMTS. |
| System Administration | This is an existing module that will be modified to allow more levels of control and configuration of the system such as the granting of access to the various modules of the JMTS. |
| Reporting | This is an existing general purpose module that provides the reporting needs of the other modules. |

During the first month and a half of the JMTS consultancy period, the core of the JMTS was redesigned to accommodate the additional modules that will be implemented.

The modules in the above table will be implemented in accordance with the work plan outlined below.

1. **Work Plan**

The following table outlines the work plan that will be followed during the update and upgrade of the JMTS:

Table: JMTS Work Plan

| Module/Activity | Estimated Turnaround Time | Description/Comment |
| --- | --- | --- |
| Job Management  Legal Office  Client Management | 1 month | During implementation all relevant documentation will be created and/or updated.  The appendix to this report lists the modifications and features that will be implemented in the JMTS during the execution of this work plan.  Basic training sessions will be interspersed between the deployments of the various modules where necessary. |
| Standards Compliance  Certification  Foods Inspectorate | 1 month |
| Legal Metrology  Task Management  Service Request | 1 month |
| Standards  Financial administration  System administration | 1 month |
| Reporting  Training  Documentation | 1 month |

The appendix to this report provides details on the minimum number of features and modifications that will be implemented during the update and upgrade of the JMTS.

**Appendix**

The following table lists the JMTS modifications and features that will be implemented in the JMTS.

**Table: JMTS Features and Modifications**

| **Feature/Modification** | **Module** | **Description/Comment** |
| --- | --- | --- |
| Job to be marked completed only after the job costing is approved. | Job Management |  |
| Implement the generation of email and popup alerts for the various stages of tracking a job. |
| Facilitation of sample hand-over from one department to another. This includes “signing” when the sample is handed over. |
| Standard operating procedure(s) to be modified to include sample transfer procedure as implemented by the JMTS. |
| The state of the sample when received is to be included into the sample record. |
| Add “lead generation” information concerning the reasons why potential clients accept or reject the services offered by an organization e.g. a training seminar. | Client Management |  |
| In the client credit status dialog allow viewing of credit/regular clients only. |
| Provide control of access to the modules of the JMTS. | System Administration | Adding information about each organization will allow information about that organization to be displayed when a user belonging to that organization logs on to the JMTS. |
| Implement assigning a person to more than one department. |
| Organizational records (e.g. BSJ, NCBJ and NCRA) are to be added. Images representing the organization’s logo/banner will be included as part of an organization’s record. |
| Job turnaround times are to be reported for the Finance division. | Reporting | The list of equipment used by the labs is to be provided by Finance. |
| Report on discounts offered to clients. |
| The equipment used to do tests/calibrations is to be associated with a job and reported. |
| Monthly report is to be standardized where possible across the divisions and the name changed from Monthly Report to “Departmental/Divisional/Lab Report”. The calculation of COTIF is to be standardized. Divisional and lab reports are to be created that also gives COTIF. |
| Cost Scheduling and Proforma Invoice generation will be included into system. | Financial Administration & Management | Cost codes are to be assigned by the Finance division. |
| Implement importing job costings into the Accpac accounting software. |
| Implement setting currency and exchange rates for costing and payments. |
| Implement option to turn off the charging of taxes such as GCT for specific departments. |
| Designate laboratories and department units as cost centres and assign cost codes. |
| Revamp the module and include additional reports and alerts. | Legal Office |  |
| Reactivate the existing features and implement email and popup alerts for the Port of Entry Detention and other processes. | Standards Compliance | The requirements in the document “Software User Requirements  The Compliance Department” by Ms. Susan Muir will be implemented. |
| Features to enhance company certification process to be implemented. | Certification (NCBJ) |  |
| Alerts to be generated when a task in the certification process is due, soon due or overdue. |
| NCBJ data re certification process to be imported such as scheduling information, auditor and technical experts lists |
| Reactivate the existing features and implement email and popup alerts for the factory registration and other processes. | Foods Inspectorate |  |
| Reactivate the existing features and implement email and popup alerts for the petrol pump verification and other processes. | Legal Metrology |  |
| Facilitate the entry of requests from internal and external clients as tasks. | Task Management | This module will be implemented mainly for the BSJ’s Corporate and Legal offices. |
| Alerts when tasks are due or soon due are to be generated. Multiple alerts can be sent when required action is not taken such as when the task is not marked completed after a set number of days. |
| Aspects of the task are to be tracked such as turnaround time. |
| Implement tracking of the phases in the standards development process and generate alerts where necessary. | Standards & Certification |  |
| Implement WTO notification database. |
| Implement IEC/ISO standards commenting/tracking. |
| Implement technical committee database. |
| Implement a database of all standards published or being developed by the BSJ and CROSQ. |
| Implement a RESTful web service that can be interfaced with the BSJ’s website and allow clients to submit service requests and track the status of jobs submitted. | Service Request |  |